Table of Contents

Overview ......................................................................................................................................... 1
What is a CSV file? ......................................................................................................................... 1
Importing to SmartOffice ................................................................................................................ 2
  SmartOffice Data Import Fast Class ............................................................................................ 2
  SmartOffice Data Import User Guide .......................................................................................... 2
  SmartOffice - Available Fields for Import ................................................................................... 2
Exporting from GoldMine® ............................................................................................................. 3
  Separating Names into Individual Columns ................................................................................ 5
Exporting from Microsoft® Outlook® .............................................................................................. 7
Exporting from ACT!™ .................................................................................................................... 12
Exporting from Palm™ Desktop ................................................................................................... 16
Exporting from Advisors Assistant® ............................................................................................. 19
Third Party Support Links ...................................................................................................... 21
  ACT! Support: ........................................................................................................................... 21
  Advisors Assistant Support: ..................................................................................................... 21
  GoldMine Support: .................................................................................................................. 21
  Microsoft Outlook Support: ...................................................................................................... 21
  Palm Support: ......................................................................................................................... 21
Overview

This guide outlines the steps necessary to export contact data to and from commonly used Customer Relationship Management (CRM) programs for import into SmartOffice®. This guide is comprehensive; however, it may not cover every possible situation. If you find that you require more detailed or specific instructions, please use the links provided to contact the manufacturer of the corresponding software.

What is a CSV file?

To import data into SmartOffice, the data must be in Comma Separated Value (.csv) format. A CSV file contains the values in a table as a series of ASCII text lines organized so that each column value is separated by a comma from the next column's value and each row starts a new line.

For example:
Doe, John, 944-7077
Johnson, Mary, 370-3920
Smith, Abigail, 299-3958

A number of applications can be used to open and work with CSV files (e.g., Microsoft® Excel®).

Most importantly, the data must be saved to a file with a .csv extension. To learn how to use Microsoft® Excel® to save data in a CSV file format, consult the MS Excel Help system.
Importing to SmartOffice

After following the steps for the applicable affiliate program to export your contact information into .csv format, follow the links below for instructions on importing your data into SmartOffice.

SmartOffice Data Import Fast Class

SmartOffice Data Import User Guide

SmartOffice - Available Fields for Import

Important: When importing data into SmartOffice, all data must be separated into its own column. If, for example, the Contact’s Name is in one field, it must be separated into a First Name Column and a Last Name Column.

The following is a list of fields in SmartOffice that data can be imported into:

- # of Children
- Age
- Alphakey
- AlphaNum1
- AlphaNum2
- Birth Place
- Business Fax
- Business Phone
- Business City
- Business Country
- Business Moved in Date
- Business Remark
- Business State
- Business Street
- Business Street2
- Business Street3
- Business Street4
- Business Street5
- Business ZIP Code
- Date of Birth DOB
- E-Mail
- Employer
- First Name
- Gender
- Greeting
- Job Title
- Last Name
- Marital
- Middle Name
- Mobile (Cell Phone)
- Nationality
- Net Worth
- Occupation
- Pager
- PIC
- PICQ
- Primary Language
- Remarks
- Residence Fax
- Residence Phone
- Residence City
- Residence Country
- Residence Moved in Date
- Residence Remark
- Residence State
- Residence Street
- Residence Street2
- Residence Street3
- Residence Street4
- Residence Street5
- Residence ZIP Code
- Review Date
- Salary
- SmartPad Notes
- Spouse Notes
- Spouse Age
- Spouse Date of Birth DOB
- Spouse Employer
- Spouse Greeting
- Spouse Info
- Spouse Job Title
- Spouse Occupation
- Spouse Preferred Phone
- Spouse Salary
- Social Security #
- Sub-Source
- Sub-Type
- Suffix
- Title
- Tobacco
- Total Income
- Web Site
- ZIP Code
Exporting from GoldMine®

1. Open the Contact Search Center to display the Contacts for export.

2. After displaying the Contacts for export, click the Columns button to open the Browser Column Selection dialog box.
3. Specify the appropriate columns for export and then click the **OK** button to return to the Contact Search Center.

4. Click the **Output To** button and then select the **Excel** option from the expanded menu to open Microsoft Excel and display the exported information.
Separating Names into Individual Columns

Note that when contact data is exported from GoldMine, the Contact’s First and Last Name display in the same column. Before importing data into SmartOffice, you will need to separate the first and last names into separate columns.

1. Position your cursor in the column to the right of the Contact column. In the example above, this would be column C.
2. Select **Column** from the expanded **Insert** menu.
3. Click the Contact column heading to select the entire column. In the example above, this would be column B.
4. Click **Data** then select **Text to Columns** to display the Convert Text to Columns Wizard - Step 1 of 3 dialog box.
5. Select the **Delimited** option and then click the **Next** button to display Step 2 of 3 of the Wizard.

6. In the Delimiters section, select the **Space** option and then click the **Next** button.

7. Click the **Finish** button on the last screen of the Wizard. The first and last names now display in separate columns. For help on this feature, please refer to the Microsoft Excel Help system.
8. In MS Excel, select **Save** from the expanded **File** menu to open the Save As dialog box.

![Save As dialog box from MS Excel](image)

9. Enter a **File name**, specify a **Save In** location, select **CSV (Comma delimited)** (*.csv) from the Save as Type drop-down list and then click the **OK** button to save the exported information.

For more information on export features in GoldMine, contact GoldMine Technical Support.


### Exporting from Microsoft® Outlook®

1. From MS Outlook, select the **Contact** folder containing the data to be exported.

![Contacts folder in MS Outlook](image)
2. Select **Import and Export** from the expanded **File** menu.

3. From the Import and Export Wizard dialog box, select the **Export to a file** option and then click the **Next** button.
4. Select the MS Outlook Contact folder containing the data to be exported and then click the Next button.

5. Name the exported data file and then click the Browse button to select a location to save it. The default save location is the Desktop. Be certain to retain the file’s .csv extension and then click the Next button.
6. Click the **Finish** button to export the information.

![Image of Export to a File dialog box]

7. Locate and open the saved file.

![Image of file explorer with contacts.csv highlighted]
8. In MS Excel, remove the columns that do not contain data relevant to SmartOffice.

9. Select Save from the expanded File menu.

10. Enter a File name, specify a Save In location, select CSV (Comma delimited) (*.csv) from the Save as Type drop-down list and then click the OK button to save the exported information.

If you have more questions about exporting from MS Outlook, contact Microsoft Technical Support.

Exporting from ACT!™

1. In ACT!, adjust the Contact List so that it displays all of the contact records for export.
2. Add or Subtract columns so that the Contact Information displayed is what is for export.
3. Click the File menu item and then select Export from the expanded Data Exchange menu.
4. Select **Text – Delimited** from the File Type drop-down list and then click the File Name and Location Selection button.

![Image of Export Wizard](image1.png)

5. In the Save As dialog box, name the exported data file, select **Text – Delimited (*.csv)** from the Save as Type drop-down list, select a location to save the file and then click the **Save** button.

![Image of Save As dialog](image2.png)
6. In the Export Wizard dialog box, select the **Contact records only** option and then click the **Options** button.

7. Select the **Comma** and **Yes, export field names** options and then click the **OK** button.
8. Select the **Current lookup** option and then click the **Finish** button.

9. Specify the order of the fields to be exported and then click the **Finish** button.
10. Open the exported .csv file in Microsoft Excel to display the exported information.

11. Select Save from the expanded File menu.

12. Enter a File name, specify a Save In location, select CSV (Comma delimited) (*.csv) from the Save as Type drop-down list and then click the OK button to save the exported information.

If you have more questions about exporting from ACT!, contact ACT! Technical Support.


Exporting from Palm™ Desktop

1. From Palm Desktop, click the Contacts button and then select the contacts you want to export; or, do not select any contacts in order to export all of them.
2. Select **Export** from the expanded **File** menu.

3. From the Specify Export Fields dialog box, check the fields of information that you would like to export and then click the **OK** button.
4. Name the exported data file, specify a location to save the file, select **Comma Separated (*.csv, *.txt)** from the Export Type drop-down list, make certain to retain the .csv extension on the File Name and then click the **Export** button.

![Export As dialog box](image1)

5. Open the exported .csv file in Microsoft Excel to display the exported information.

![Microsoft Excel - contacts.csv](image2)
6. Select Save from the expanded File menu.

7. Enter a File name, specify a Save In location, select CSV (Comma delimited) (*.csv) from the Save as Type drop-down list and then click the OK button to save the exported information.

If you have more questions about the Palm export, contact Palm Technical Support.

**Palm Support:** [http://www.palm.com/us/support/](http://www.palm.com/us/support/)

### Exporting from Advisors Assistant®

The Advisors Assistant contact information export is a two step process. First the information is exported to MS Outlook’s Contacts section, then it is exported to a .csv file. Follow the instructions below to export the contacts to MS Outlook and then refer to the Exporting from Microsoft® Outlook® section to finish the process.

1. Note that Advisors Assistant can only export to the main MS Outlook Contacts folder. If you do not want to export these pre-existing contacts with the .csv, you will need to move them to a sub-Contacts folder.

2. In Advisors Assistant, select the Utilities menu item, and then select Export to Outlook from the expanded Outlook Import/Export menu.
3. Enter your export criteria if you want to export a certain set of contacts; or, leave the fields as they are and then click the **Search** button to export all contacts.

4. Select the **Process Selected Contacts** option, clear the Process Calendar option, and then click the **OK** button.
5. Open MS Outlook to view the exported contacts in the Contacts folder.

6. Refer to the Exporting from Microsoft® Outlook® section above to continue the process of exporting to a .csv file.

If you have more questions about exporting from Advisors Assistant, contact Advisors Assistant Technical Support.

Advisors Assistant Support: http://www.advisorsassistant.com/support.htm

Third Party Support Links

ACT! Support:
http://www.act.com/support/index.cfm

Advisors Assistant Support:
http://www.advisorsassistant.com/support.htm

GoldMine Support:

Microsoft Outlook Support:
http://support.microsoft.com/oas/default.aspx?LN=en-us&gprid=2520&x=10&y=17

Palm Support:
http://www.palm.com/us/support/